

## Scope

This process defines steps necessary to establish the Project Delivery Team (PDT).

## Policy

*ER 5-1-11*[<http://www.usace.army.mil/inet/usace-docs/eng-regs/er5-1-11/entire.pdf>]

*ER 37-1-26*[<http://www.usace.army.mil/inet/usace-docs/eng-regs/er37-1-26/entire.pdf>]

## Responsibility

The Project Manager (PM) is responsible for initiating and leading the Project Delivery Team (PDT). PM will make every effort to identify all functional areas needed for project success during the planning stage, and to involve them throughout the lifecycle of the project.

The Resource Providers assist the PM by identifying team members for the project. They are also responsible for mentoring and supporting their assigned team members, **quality process implementation**, Response: BP team will review and respond and for maintaining the integrity of the original PDT to the greatest extent possible.

Both PMs/PDTs and Resource Providers are responsible for and empowered to keep commitments they make in the project management plan. **(This is considered an “end state” cultural change versus current real world.)** Response: yes.

## Distribution

Project Manager (PM)\*

Resource Provider(s)\*

## Ownership

The BP/P2 Program Office is responsible for ensuring that this document is necessary, that it reflects actual practice, and that it supports corporate policy.

## System References

*Acronyms and Glossary*[REF1001]

*Change Management*[PROC1004]

*Customer Scope Definition*[PROC1007]

*PMP Development*[PROC1012]

*PMP/PgMP Content*[REF1018]

## Activity Preface

This process is performed during PMP Development[PROC1012], once the customer and project scope have been identified, and whenever a member of the PDT is added or replaced. A resource in the context of this process is defined as an individual from within a District/Lab/Center, or another office within the region. Resources obtained via contract are addressed in Project Delivery Acquisition Strategy[PROC1020].

The PM may request a specific individual from a Resource Provider based on that individual's unique talents or experience on a project. The Resource Provider will take the PM's request into consideration when making an assignment to a project. In making assignments, the Resource Provider will perform Project Workload Analysis and Resource Leveling[PROC1014] to verify availability of resources.

If the PM and Resource Provider are unable to find or agree on the appropriate resource for a project, the issue will be raised through the chain of command within the District/Lab/Center. If the resource is unavailable at the District/Lab/Center, a resource will be sought from within the region **or beyond**.

Response: Reworded. See master document

Once a resource is committed to a project, the Resource Provider cannot change that commitment without **negotiating** Response: Rejected with the PM. The Resource Provider retains all supervisory control **(administration, performance, training)** Response: Reworded. See master document, addressed in **responsibilities** over their employees. Changing a resource commitment during project execution is a threshold that causes Change Management[PROC1004] to execute.

The PM will **ensure** Response: Accepted the team members **are entered** Response: Accepted into P2, giving them the level of access needed to perform their functions within the system. After the team members are entered into P2, the process returns to PMP Development[PROC1012].

## Project Manager (PM)

1. Evaluate deliverables defined in scope of work of the project to determine what expertise is required on the project team.
2. Provide basic scope of work, preliminary schedule, and preliminary project budget to the resource providers.

The preliminary schedule and project budget is based on experience with projects of similar scope and complexity.

3. Request personnel for functions to be performed.

PM may request specific team members that s/he believes would add unique value to a specific project. **PM should try to balance strengths and limitations of the requested PDT members.** Response: Reworded. See master document, see step 4s.

**PM provides feedback to Resource Providers regarding team member performance.** Response: Reworded. See master document, see step 4.

## Resource Provider(s)

4. Review information provided by PM.
5. Determine expertise required and time commitment needed.

**Stop and complete Project Workload Analysis and Resource Leveling[PROC1014].**

If specific members are requested by name, then the Resource Provider(s) should try to accommodate the request, but must balance workload and prior commitments to avoid over-committing individual team members.

6. Inform PM of team member(s) nominations to support the project.

ER 5-1-11 states that Resource provider(s) are responsible for providing qualified PDT members.

7. Request PM's concurrence.

## Project Manager (PM), Resource Provider(s)

**If both PM and Resource Provider(s) agree, goto task #10. Otherwise, goto task #8.**

8. Elevate issue within district/lab/center as appropriate.

**If team member issue resolved, goto task #10. Otherwise, goto task #9.**

9. Search for appropriate resources throughout the region **or beyond**. Response: Reworded. See master document

If there are insufficient resources available locally with the requisite capabilities, then the PM/Resource Provider(s) will look throughout the region **or beyond**. Response: Reworded. See master document

## Project Manager (PM)

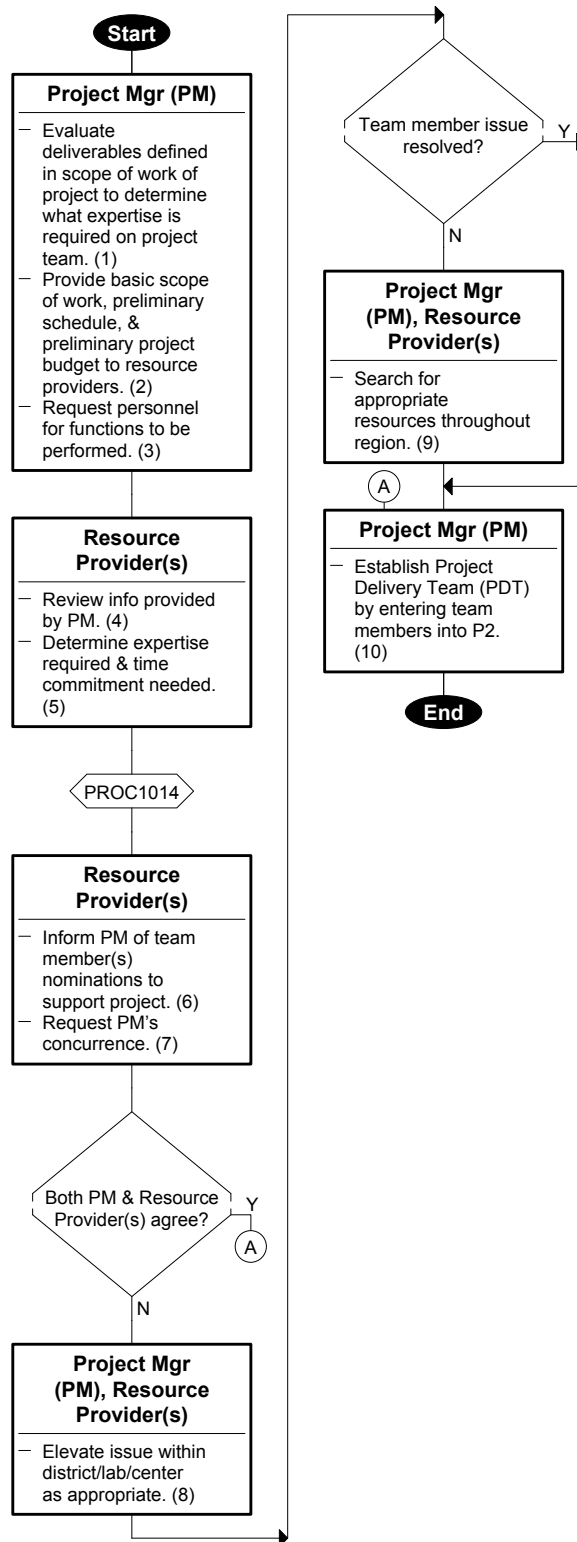
10. Establish Project Delivery Team (PDT) by **ensuring** Response: Reworded. See master document team members **are entered** Response: Reworded. See master document into P2.

Send notification to team members.

Team member assignments (especially the PM) remain constant throughout the life of the project, if at all possible. Also, USACE activities will make every effort to maintain original team members through the lifecycle of the project, making substitutions only when absolutely necessary.

Note: a change in one or more team members is a threshold in Change Management[PROC1004] for returning to PMP Development[PROC1012].

**End of activity.**



**Team Establishment Flowchart**